



## CITY OF LODI COUNCIL COMMUNICATION

**AGENDA TITLE:** Discuss and Provide Direction to Develop a City Manager Candidate Profile and Recruitment Strategy

**MEETING DATE:** August 24, 2004

**PREPARED BY:** City Clerk

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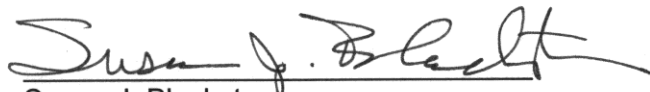
**RECOMMENDED ACTION:** Discuss and provide direction to develop a city manager candidate profile and recruitment strategy.

**BACKGROUND INFORMATION:** This matter appears on the agenda at the request of Mayor Hansen. Council Members met individually with a representative from CPS Executive Search on August 18 to develop individual insights regarding the community's needs and the personal and professional characteristics desired in a city manager. In addition, at the regular City Council meeting of August 18 Council approved the agreement with CPS Executive Search and appropriated necessary funds.

Task 4 of the Executive Search Process Development of Candidate Profile and Recruitment Strategy includes the following activities:

- The City Council will identify priorities for the new city manager;
- The consultant will assist the City Council in identifying the conditions and challenges likely to be encountered in achieving the priorities;
- The City Council will describe the type of working relationship it wishes to establish with the city manager;
- The consultant will assist the City Council in generating a list of specific competencies, experiences, and personal attributes needed by the new city manager; and
- The consultant will present several recruitment and selection strategies for the City Council's consideration. The City Council will choose the recruitment and selection process most likely to produce the intended results.

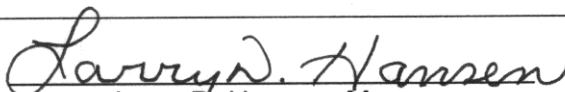
**FUNDING:** None required.

  
Susan J. Blackston  
City Clerk

SJB/jmp

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APPROVED:

  
Larry D. Hansen, Mayor

**CITY OF LODI  
CITY MANAGER RECRUITMENT  
2004**

**DRAFT PROFILE STATEMENT**

**THE IDEAL CANDIDATE**

The ideal candidate will be a seasoned general management professional or top-level assistant manager with significant experience in a comparably sized organization, and has extensive knowledge in financial management, economic development, and community development. This strong, self confident and energetic leader will bring exceptional interpersonal, communication, and negotiation skills to the position; be visible in and involved with an active community; and work closely and effectively with a talented City staff. The new City Manager will develop a strong relationship with the City Council based on partnership, mutual trust, respect, regular and candid communication, and equal treatment of all members. City/local government management experience is desirable, but not required. Electrical power management experience is also desirable.

**Education**

A Bachelor's degree in public or business administration or related field is expected. A Master's degree in a related filed is desirable.

**Leadership and Management Style**

- An effective, service oriented manager who respects employees, holds the organization accountable, and cultivates high morale.
- Someone who will develop a strong identity with the Lodi community, its citizenry and unique characteristics.

**Competencies and Personal Characteristics**

In addition to the above qualifications, the City Manager will also:

- Possess integrity, a strong sense of ethics, and the courage of his/her convictions
- Maintain and enhance the City's financial health; manage City resources wisely.
- Able to learn quickly
- Be visible in the community
- Be collaborative; values input from others
- Be an intelligent, strategic thinker
- Possess a strong work ethic
- Be a facilitator of consensus and collaboration
- Be a people person; accessible and approachable
- Be a creative problem solver
- Use a team approach to management
- Serve impressively as City spokesperson when necessary
- Be calm under pressure; thick skinned; and possesses a good sense of humor
- Be politically astute, yet apolitical

filed 8-24-04

**CITY OF LODI  
CITY MANAGER  
PROPOSED RECRUITMENT SCHEDULE**

<b><u>TASK</u></b>	<b><u>COMPLETED BY</u></b>
1. Kickoff meetings;	
a. Initial meeting with Mayor	8/16
b. Individual City Council member interviews	8/18
c. Meet / talk with others to develop profile	8/19-23
d. Profile development meeting with City Council; finalize profile & schedule	8/24
2. Prepare and place advertising	8/25
a. Advertising appears	8/26 – 9/30
3. Recruitment brochure	
a. Draft brochure text submitted to City	8/27
b. City provides text changes	9/3
c. Brochure printed & distributed	9/10
4. Identify and contact potential candidates	9/13 – 10/8
5. Final filing date for candidates	10/15
6. Resume review and preliminary interviews	
a. Preliminary resume screening by consultant	10/18-19
b. Preliminary interviews by consultant	10/21-29
7. Meet with / present written report to City Council; Council selects finalists	11/1-5*
8. City interviews finalists; recommends top 1-2 candidates	11/15-19*
9. Consultant conducts background & reference checks on top candidates	7-10 days
10. City Council's (including Council members-elect) second interview with top candidates	11/29 – 12/3*
11. City Council makes offer appointment	12/3

\*date to be determined by City

**CITY OF LODI  
CITY MANAGER RECRUITMENT  
2004**

**COMMUNITY MEMBER CANDIDATE PROFILE COMMENTS**

**CHALLENGES**

1. Economic development
  - a. developers feel that development in Lodi is costly; inefficient
  - b. community needs to grow – can't stand still; Lodi must be able to compete with other communities for sales tax revenues
  - c. make better economic development effort
  - d. community has lost some jobs; revenues have reduced
  - e. need more economic development
2. Staff management
  - a. need to upgrade quality of some City departments
  - b. City staff needs firm direction
  - c. Have good City staff
  - d. public safety employees underpaid
  - e. handle increase in employee healthcare costs
  - f. hold the line on employee compensation increases
  - g. weak City Human Resources Department; not working collaboratively with labor groups
3. Groundwater lawsuit
  - a. make expenditure cuts to pay for
  - b. CM should express City's position; like captain of the ship
  - c. City likely over the hump now, but paying for solution still an issue
  - d. lawsuit
  - e. lawsuit; can't keep hitting City rate payers
  - f. lawsuit
4. City Budget
  - a. balance budget; work within existing revenues
  - b. City's service expansion on hold due to reduced revenues
  - c. hold the line on costs; make tough decisions
  - d. budget issues; limit effect on service levels
5. City Council relations
  - a. working to bring the City Council back together again
6. Enhance City's image and credibility

7. Growth issues
  - a. community is clarifying its growth policies; big box limitation initiative
  - b. City struggling with a vision for itself – big box initiative, have revitalized portion of downtown – need to do more; growth issues v/v Stockton
  - c. agriculture-urban interface issues; need to finance greenbelt; preserve uniqueness
8. Community improvements
  - a. Need to consider affordability for community; determine priorities
9. City may be placing too much importance on results of recent community survey

## **BACKGROUND DESIRED**

1. Experience
  - a. should be experienced manager, not just an assistant or deputy
  - b. experience to run this City
  - c. could be first time city manager
  - d. business management skills more important than government experience
  - e. can come from the private sector
  - f. should come out of city government environment; at either city manager or top assistant; need to limit learning curve
  - g. must know how city works
  - h. either public or private sector experience OK
  - i. local government experience preferred
  - j. must know how to “run the show” like Hank Graves; be a strong leader
  - k. need experienced city manager
  - l. familiarity with Lodi preferable
  - m. need experience in the job; knows the job
  - n. could promote from within the City
  - o. not necessarily from city government
  - p. need best qualified from either public or private sector
  - q. experienced managing in difficult situations
2. Economic development
  - a. have a vision for growth; innovative to achieve more growth & capital improvements
  - b. able to manage a city “investment” strategy; see the big picture of building something
  - c. economic development skills; bring business in
  - d. experience with tourism positive

3. Financial management background
  - a. should have background in financial management
  - b. doesn't need strong financial background; has related help on City staff
  - c. understand budgets and finance
4. California experience
  - a. not that important
  - b. likely not important
  - c. not that critical
  - d. not that important
  - e. a plus
  - f. not that important
5. Education
  - a. BA just fine
6. Other
  - a. good understanding of Brown Act & public's right to know
  - b. experience in related groundwater litigation preferable

#### **PERSONAL QUALITIES**

1. Integrity
  - a. Honesty
2. Work with City Council
  - a. willing to work with the City Council without being adversarial
  - b. understand politics
  - c. work well with the City Council; need to be on same page; develop better harmony
  - d. work well with the City Council; listen, find best solutions for the City
  - e. encourage City Council to do their jobs
3. Leadership
  - a. must have backbone; stand on principles
  - b. be a mainstay for the organization and community
  - c. able to take a stand; tell City Council what is best for the City; passionate
  - d. leadership
  - e. stand up on principle
  - f. able to rally community around leadership
  - g. viewed as a leader
  - h. not a politician
  - i. stand up to criticism

- j. tough
- 4. Communication skills
  - a. able to communicate
  - b. communicator
  - c. good communicator; professional
  - d. communication
- 5. Staff management
  - a. good working relationship with City employee organizations
  - b. be a resource to City staff
  - c. no micro management
  - d. confident in a team setting
- 6. Community involvement
  - a. credible with the community
  - b. outgoing with the community
  - c. involved within community
  - d. able to build coalitions within the community
- 7. Common sense
- 8. Pro-public safety
- 9. Creativity
  - a. creative problem solver
- 10. Confidence
  - a. self confident, assertive
- 11. Able to manage multiple projects
- 12. Collaborative
- 13. Loyal
  - a. to the City; take care of City first
  - b. has greater good of community in mind
- 14. Decisive
- 15. Interpersonal skills
  - a. able to deal effectively with a broad range of personalities
  - b. able to agree to disagree, and get on with business
  - c. able to work with a wide variety of individuals
  - d. people person



16. Quick learner

17. Intuitive

filed 8-24-04

**CITY OF LODI  
CITY MANAGER RECRUITMENT  
2004**

**CITY COUNCIL CANDIDATE PROFILE COMMENTS**

**COMMUNITY ASSETS**

1. **Attractive community -**
  - a. good planning – orderly growth; keep up with infrastructure needs; clean
  - b. positive City history
  - c. attractive homes
  - d. good growth, keeping small town charm
  - e. access to amenities
  - f. many community traditions – Grape Festival; New Year's celebration, etc.
  - g. family atmosphere
  - h. strong capital investments within community in recent years
  - i. good City layout; slow growth
  - j. well maintained parks
  - k. good family community
  - l. generally safe community; crime not a major issue
  - m. family oriented, small town charm unlike other many other California communities
  - n. good location, climate
2. **Actively involved community -**
  - a. many volunteers & civic groups
  - b. people donate their time
  - c. civic pride
3. **Schools –**
  - a. Clean, safe with good reputation
  - b. City has excellent working relationship with school district – several joint projects
  - c. good schools
4. **Community partnerships –**
  - a. good partnership with Chamber of Commerce; Chamber is doing well for City
  - b. good partnership with downtown businesses; put in \$\$\$, good turn around so far with good potential for future improvement
  - c. good partnership with Hutchins Square Foundation
  - d. partnering with Lodi Wine & Visitors Bureau – progressing toward making Lodi more of a tourist destination

- e. Grape & Wine Festival improving every year
- 5. **Economic development –**
  - a. though community has lost some jobs, economic development efforts have brought new business to the area (Kabota Tractor, Loews)
  - b. good development and tax revenue increases
- 6. **City financial strength -**
  - a. good reserves overall
  - b. maintaining low debt ratio
  - c. municipal electric utility provides low rates to community; revenue to the City
  - d. recently bought water rights from Woodbridge ID to replenish City's ground water
- 7. **City staff -**
  - a. continuity with City staff
  - b. confidence in City staff
  - c. good relations with City employee organizations

## **CHALLENGES & ISSUES**

- 1. **Groundwater pollution issue –**
  - a. Cost? City's liability?
  - b. How to pay?
  - c. Resolve litigation; commence cleanup - restore public confidence
- 2. **Budget out of balance –**
  - a. City drawing down reserves; able to repay internal borrowing?
  - b. likely need to reduce staff
  - c. budget shortfall needs to be addressed; reduce draw down on reserves
- 3. **City's General Plan update** scheduled for next year
  - a. need progressive growth similar to City's history
  - b. need to welcome families
  - c. General Plan update; Lodi-Stockton greenbelt
- 4. **Economic development –**
  - a. attract high quality jobs
  - b. need more land designated for business
- 5. **Community facility needs -**
  - a. East side improvements
  - b. State mandates on sewage treatment improvements – how to fund

- c. Community's interest in future capital improvements – animal shelter, aquatics & indoor sports center – how to pay?
- 6. **Differences in community; among City Council –**
  - a. Community has differences on keeping things the same vs. obtaining new amenities
  - b. City budget, labor negotiations/employee compensation; groundwater lawsuit
  - c. Need interaction with City Council and its differences
  - d. Consensus building between City Council and City Manager; need to actively pursue greater sense of team

## **BACKGROUND DESIRED IN CITY MANAGER**

- 1. Experience
  - a. city government exp preferred; county government experience possible
  - b. understands business, finance & budgets and other aspects of running a city
  - c. prefer experience as city manager
  - d. experienced city manager desirable; top level assistant or department director, or county management experience acceptable
  - e. ongoing development; involved in city management profession
  - f. management experience, not necessarily in government; personnel management
  - g. needs some government experience – knows the structure of city organizations
  - h. involved with Chamber of Commerce, or professional associations
  - i. private sector management experience preferred, with some experience in public sector desirable
  - j. good mix of executive director or vice president level experience
  - k. minimal learning curve desired
- 2. Financial management experience & knowledge
- 3. Skilled negotiator
- 4. Land use knowledge
- 5. Economic development skills -
  - a. able to take active part in economic development in Lodi
- 6. Human resources –
  - a. understands HIPPA
  - b. knows employee benefit issues

7. Electrical power utility knowledge
8. California experience –
  - a. might be important
  - b. preferred, not required
  - c. not that important
  - d. not that critical
  - e. not that important
9. Education
  - a. experience more important than education – BA expected, MA desirable
  - b. BA expected; MA desirable
  - c. BA expected, MA nice to have

#### **PERSONAL QUALITIES**

1. Integrity; credible; great reputation
  - a. integrity, honesty
  - b. strong work ethic
2. Community relations skills –
  - a. comfortable being with & interacting with community
  - b. solicits input & opinions of others
  - c. values community input
  - d. communicator in the community; able to speak “off the cuff”
  - e. fosters positive relations within the community
3. Intelligent
  - a. strategic thinker
4. Able to evaluate and enhance City services
5. Communicate effectively
  - a. expresses self well; good speaker
  - b. communicates well; orally and in writing
6. Personable
7. Self confident
  - a. confident in their own skills & knowledge; know who they are
8. Leadership
  - a. able to make tough decisions
  - b. commands respect
  - c. thick skinned

9. Works well with elected officials
10. Delegates responsibility & authority –
  - a. does not micro-manage
  - b. interact well with City employees
  - c. team oriented approach to management
11. Politically astute
  - a. diplomatic

filed 8-24-04

To: Lodi City Council Members  
From: Pastor Steve Jarrett  
Subject: City Manager Recruitment

I stand before you this morning to express my reservations concerning the processes that the council has begun concerning the recruitment of a new City Manager.

I wish to say to the council very clearly and very loudly – SLOW DOWN!!

As of this morning it has only been 17 days since the City Manager has resigned. Already you have decided the process to be used, the firm that will find the new city manager and set a time frame to find this new city manager in as little as 12 weeks.

My question to you this morning is: Why the rush? I do not see need and I feel that it is not prudent or in the best interests of the citizens of Lodi. Let me explain why I think this.

1. I do not believe that this Council, at the present time, has the confidence of the citizens of Lodi to choose a new City Manager. The city has just gone through the firing of the City Attorney and the abrupt resignation of the City Manager because of the current problems and issues besetting the city. These current problems and issues are the result of the decisions made by both City Management Staff and the Council, albeit both present and past councils. Citizens are concerned with the current direction of their city government.

2. This concern with the current direction of their city government causes citizens to want to have a voice concerning this direction through the voting process which will take place on November 2<sup>nd</sup>. With the selection of two new Council members, the council then, with integrity, can determine the desire of the citizens of Lodi with much more clarity. The new makeup of the new council can then determine what is needed in a new City Manager to lead us through the current problems and issues.

3. I do not believe that the recruitment will generate quality candidates for the City Manager position because of the current condition of the city. The current issues concerning the State of California withholding funds for at least for the next two years, the current budget shortfall of 1.9 million dollars, the 20 million dollar debt on the loan for the contamination lawsuit litigation, the continuing costs of the that litigation, the project costs of the cleanup of the contamination, the fact that there is a brand new Finance Director, a brand new City Attorney, a slow growth cap of 2% a year, the possibility of a city ordinance being passed that would complicate new large retail coming to the city, all of these issues spell a time of extremely hard going in the office of the City Manager. I believe recruitment will generate less than stellar candidates.

4. If by chance a quality individual did apply. With the integrity, skills and experience we desperately need, they will require a higher salary than we are offering. This would create within the Council the felt need to meet the income requirements of this candidate. If the council did that, raised the salary, that would be a disservice to the employees of the City of Lodi and a disservice to the citizens of Lodi. This Council, although forced to do so, has asked each city employee to do more than their fair share. The hiring freeze, although needed, has placed more burden on every single employee. To pay more than the current budget amount for the City Manager would be dishonoring their sacrifice. To pay more than the current budget amount for the City Manager would be dishonoring each and every citizen of Lodi who is suffering because of the lack of employees. Everyone who has to wait longer for services, pay more for services, or maybe even have services removed because of the current budget limitations.

These are the reasons why I oppose the Council's current strategy. Now, because I feel that it is the responsibility of everyone not only to voice their complaints but to also contribute to the solution, I submit the following for your consideration:

The Council should offer the current Interim City Manager a three year contract at the current budgeted amount for the City Manager position. Here is why I believe this to be a prudent action.

1. In three years the State's budget situation will hopefully be resolved and we will have a clear indication as to what we can expect in revenues from the State which will greatly impact our budget and help determine our fiscal strategy. It is anticipated that we will be receiving what is owed to us and that will allow us to be in a better financial situation.
2. In three years the new Council will have brought to completion the contamination lawsuit, one way or another. The financial impact of that will be known and with clarity a strategy for repayment established.
3. In three years the new Council will have determined what will be needed to clean up the contamination. It will have determined the costs and found the resources. The financial impact it on the City will be known.
4. In three years, the new Council, working with the community, will have updated the general plan, teamed with commerce and the citizens to determine the vision and direction that Lodi will take.

It is only after these four things have been accomplished that Lodi will truly be ready for a quality candidate for City Manager. A candidate to manage the city government with the quality and competency we require.